

Key Outcomes – Practitioner lodgment service working group

Venue: MS Teams
Date: 21 May 2024
Start: 1.00pm AEST **Finish:** 1.48pm AEST
Chair and facilitator: Sonia Lark
Contact: Kaethe Seidel-Wynne
Contact details: 02 9354 3014

Attendees:

Sonia Lark, Felicity-Ann Stokes, Anusha Young, Chanara Fraser

Guest Speakers:

Apologies:

ATO – Sangitha Sivayogaraj, David Baker

Agenda item 1 – Welcome

Sonia opened the meeting and welcomed the group.

Agenda item 2 – Action item updates

There is 1 open [action item](#). There are no further updates to provide on the BIC code action item. It will remain on pause until Tax Time so we can see if the updates have improved the experience.

Agenda item 3 – Tax time related documentation

There have been several Tax time forms and instructions published since our last meeting. We continue to upload them to the DSP Hub as they become available. To view published documentation, visit the [2024 Tax Time documentation page](#).

The following items have been published in the DSP hub within the last fortnight:

Change Advice:

[CA2024-019 Self Education deductions – changes to D4 & D5](#)

Tax time publications:

[2024 Pay as you go \(PAYG\) withholding tax tables](#)

[2024 Pre-filling report - Importing data into tax agent software specification](#)

Federal budget – measures impact assessment:

[2024-25 Federal budget measures and start dates – Measures impact assessment](#)

Agenda item 4 - Update on general matters and Tax time delivery

With EVTE occurring on the weekend, there have been a number of tickets requesting PROD access that were lodged early. Please wait until the first week of June to lodge your requests.

For those with outstanding tickets, we are working our way through to finalise them.

The [Tax time 2024 PLS Additional Information FAQ](#) page on the DSP Hub will be updated to provide advice about the published final [2024 Company tax return](#) form which does not reflect the increase in digits from 11 to 15, as mentioned in Change advice [CA2024-018 Large dollar values for Company tax return 2024](#). The increase of digits on the Company tax return paper form is anticipated to occur in 2025.

All FBT tickets have been updated and closed, please let us know if this is not the case. The Product register should be updated shortly.

There have been no further updates about PVT for NITRs, however a decision is anticipated for early June.

Agenda item 5 – Delivery update

The next EVTE deployment is scheduled for 1 June 2024 with publication of artefacts on 31 May 2024:

- LCMSF 2024– code and conformance suites will be made available.
- Small Business Energy Incentive validation rules (mitigation strategy) remain in place as measure is still pending legislation.
- Payroll event 2020 adjust service – CS payloads updated to remove byte order mark (BOM) characters.

June EVTE - Changes to the TRT and CTR 2024 services:

TRT 2024 issues resolved

Issue - The C# code for rule VR.ATO.TRT.432179 does not align with the documented validation rule as the code includes TRT143 "Australian franking credits from a New Zealand franking company – Other assessable foreign source income, excluding income shown at Attributed foreign income" in the overall net trust income calculation check.

Resolution - The C# code to be updated to align with the documented rule i.e. remove TRT143 from the overall net trust income calculation check.

Issue – VR.ATO.TRT.433084 - Rule did not cater for no beneficiary presently entitled income.

Resolution - Rule updated to cater for no beneficiary presently entitled income.

Technical Business Rule Modified

From:

OutsideRange(^TRT478, Sum(^TRT479), 5)

To:

(^TRT230 = NULL AND OutsideRange(^TRT478, Sum(^TRT479), 5)) OR (^TRT230 <> NULL AND ^TRT478 < Sum(^TRT479))

English Business Rule and Long Message Modified

From:

Net small business income must be equal to the sum of Share of net small business income with a tolerance of \$5

To:

Net small business income must be equal to the sum of Share of net small business income with a tolerance of \$5, or when no beneficiary presently entitled income, Net small business income must be equal or exceed the sum of Share of net small business income

CTR 2024 issues resolved

Business driven change. Updated English Business Rule and Short Message Description to include wording 'less feedstock adjustments' for VR.ATO.CTR.W00028.

English Business Rule and Short Message Description (Message code - CMN.ATO.CTR.W00028)

From:

We use information in this form to meet our obligation to publish R&D expenditure companies claim. This will include publishing your company name, ABN or ACN and claim for notional deductions. For more information, see ato.gov.au.

To:

We use information in this form to meet our obligation to publish R&D expenditure companies claim. This will include publishing your company name, ABN or ACN and claim for notional deductions less feedstock adjustments. For more information, see ato.gov.au/RDTI

Agenda item 6 – Agent online environment update

Update to be provided at the next meeting.

Agenda item 7 – DSP communications update

The group were reminded of the Conformance suite test data refresh. Draft conformance suites are scheduled for publication in July, and payload updates are planned for October.

Urgent: EVTE certificate update

Urgent deployment of a new SBR ebMS3 EVTE3 outbound signing certificate occurred on 20 May 7:00 am AEST with a new certificate available in SBR ShareFile from 16 May. The [Upcoming certificate updates](#) page and the [ATO SBR Physical End Points](#) document will be updated soon. An email has been sent directly to registered DSPs.

If you have any questions, [raise a ticket](#) via the DSP service desk.

Exploring real-time PAYG instalment solutions: Express your interest in testing calculation methods

We're seeking expressions of interest from DSPs servicing small business companies who'd like to be involved in testing ATO-endorsed calculation methods in their software, which will allow taxpayers to pay instalments based on real-time economic performance. If you're interested, [raise a ticket](#) via the DSP service desk by 29 May.

Reminder: Updated ISO/IEC 27001:2022 Standard

The updated ISO 27001 Standard took effect in October 2022. This allows a transition period of up to 3 years from the publication date, dependent on the expiry date of the previous certification, for DSPs to comply with the updated standard. We've set October 2025 as the target for DSPs to comply. Ensure you set aside enough time to upgrade to the new standard for the next Operational Security Framework review. For more information, see the [DSP newsroom](#) in the DSP hub.

Agenda item 8 – Budget – May 2024-25 impact assessment

Sonia ran through the budget measures impacting the ATO highlighting those with an expected DSP impact. We will provide further visibility on these measures in the DSP Hub shortly.

Agenda item 9 – DSP feedback

An update on the SBR1 to SBR2 migration will be provided to the group at the next PLS working group meeting on 10 June 2024.

The group were reminded about the Small Business Energy Incentive mitigation strategy feedback email sent by email on 9 May.

Activity statement changes – we are still working internally through possible options and will share with the group once a decision has been made.

Action item

The group have requested visibility of issues being addressed in upcoming releases. The DPO will work with business to provide this in the DSP Hub.